

Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): American Compass

Travel date(s): 4/21/2023 to 4/23/2023

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$0.00	\$598.00	\$464.00	\$0.00
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): I attended six substantive policy sessions broken up over three days that focused on key economic policy issues including the federal deficit, safety net policy, trade policy, social policy, stakeholder engagement, and current legislation.

06/07/2023 Peyton W. Roth Peyton W. Roth
 (Date) (Printed name of traveler) (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

06/08/2023 M. H.
 (Date) (Signature of Supervising Senator/Officer)

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved.

Name of Traveler:

Peyton Roth

Employing Office/Committee:

RUBIO, MARCO

Private Sponsor(s):

American Compass

Destination(s):

Cambridge, Maryland

Travel Dates:

04/21/2023 to 04/23/2023

NOTE: If you plan to extend the trip for any reason you must notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

I am a Legislative Aide in Senator Rubio's office, where I cover economic, housing, tax, family and social welfare policy. This trip provides a unique opportunity to discuss key domestic policy challenges and opportunities with other Congressional staffers and policy experts. These discussions, and the learnings from them, will prove helpful as I advise Senator Rubio on related domestic policy issues.

Do you have an accompanying family member or spouse on this trip?

No

Name and Relationship to Traveler:

N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

03/22/2023

Date

Peyton Roth

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Marco Rubio

hereby authorize

Peyton Roth

(Print Senator's/Officer's Name)

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☒ (signify "yes" by checking box)

03/22/2023

Date

M. R.

Signature of Supervising Senator/Officer



American Compass
300 Independence Avenue SE
Washington, DC 20003
www.americancompass.org

To: Peyton Roth

3/9/23

Invitation
American Compass Workshop on Conservative Economics
Friday, April 21 – Sunday, April 23, 2023
Hyatt Regency Chesapeake Bay
Cambridge, MD

The purpose of this trip is to provide American Compass members with the opportunity to encounter new political and economic ideas that can help shape a conservative consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. This will include industrial policy, labor, family formation, financial regulation, and many more topics that members have contributed to and learned from over the past year.

You are being invited because of your interest in conservative economic policy. If you choose to attend, we will cover your lodging, meals, and provide a charter bus to and from Cambridge, MD and DC.

Sincerely,

Oren Cass
Executive Director

American Compass: American Compass Policy Workshop Retreat



Peyton Roth

Title:

Legislative Aide

Employing Office/Committee:

RUBIO, MARCO

Duty Station:

None

Destination(s):

Cambridge, Maryland

Explain how this trip is specifically connected to the traveler's official or representational duties:

I am a Legislative Aide in Senator Rubio's office, where I cover economic, housing, tax, family and social welfare policy. This trip provides a unique opportunity to discuss key domestic policy challenges and opportunities with other Congressional staffers and policy experts. These discussions, and the learnings from them, will prove helpful as I advise Senator Rubio on related domestic policy issues.

Name of accompanying family member (if any):

Not Entered

Name and Relationship to Traveler:

None

Organization Information

Organization Name

American Compass

§501(c)(3) Organization Type

Public Charity

Address 2 (Optional)

Public Charity

Phone Number

9196337020

Is your organization classified as a §501(c)(3)?

Yes



No

Address

300 Independence Ave SE

City, State Zip

Washington DC, District Of Columbia 20003 United States

Organization URL

History of Congressional Travel

American Compass was founded in 2020. Since establishing the organization, we have sponsored two retreats for which Senate staff has been in attendance. They have both been similar in scope and expense to this Retreat, with this event taking place at the exact same location as the 2022's retreat with an almost identical structure.

Educational Activities

American Compass's educational activities include: hosting lectures, seminars, and panels on a wide variety of public policy topics; conducting research to help better inform the ongoing public debates; and producing policy analysis in order better educate the public on the merits of various policy proposals.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

The trip will be a three day retreat comprised of educational sessions focused on economic policy that supports American families, workers, and industry.

Explain how the purpose of the trip relates to your organization's mission.

American Compass is a 501(c)(3) non-profit organization founded in 2020 whose mission is to restore an economic consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. Our third retreat is planned around substantive policy sessions to aid staff (governmental and non-governmental) on key economic policy topics so that they can more ably participate in ongoing public policy debates.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

 Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
04/21/2023 @ 01:00 PM



Trip End Date/Time:
04/23/2023 @ 02:00 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$45.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Ground Transportation	Charter	\$45.00
Note This a charter bus for around 40 attendees. This is a good faith estimate of the total cost per person utilizing the charter bus. This option of transportation was extended to all attendees without regard to their place of employment. Not all of the attendees who are utilizing the charter bus are employed by the Senate or House, nor are all of the individuals listed on the Senate staff attendee list availing themselves of the travel.		

Lodging (Per Member/Officer/Employee: \$598.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/21/2023	04/23/2023	Hyatt Regency Chesapeake Bay	Cambridge	Maryland	United States	2	\$299.00	Yes

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
Cost Exceeds Per Diem Reason Our nightly rate is higher than the GSA per diem. We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend.								

Meals (Per Member/Officer/Employee: \$464.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/21/2023	\$0.00	\$34.00	\$92.00	\$0.00	\$126.00	Cambridge	Maryland	United States	Yes
Cost Exceeds Per Diem Reason We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend. This is a good faith estimate based on planned attendee meals.									
04/22/2023	\$42.00	\$62.00	\$130.00	\$0.00	\$234.00	Cambridge	Maryland	United States	Yes
Cost Exceeds Per Diem Reason We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend. This is a good faith estimate based on planned attendee meals.									
04/23/2023	\$42.00	\$62.00	\$0.00	\$0.00	\$104.00	Cambridge	Maryland	United States	Yes
Cost Exceeds Per Diem Reason We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend. This is a good faith estimate based on planned attendee meals.									

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$0.00)

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments

Document Name
There are no additional attachments.

About the invitees: The following individuals were extended an invitation to the American Compass Retreat due to their interest in conservative economic policy.

Senate Staffers			
First Name	Last Name	Office	Role
Tyler	Fagan	Sen. Josh Hawley	Legislative Aid
Benjamin	Esposito	Sen. Josh Hawley	Legislative Correspondent
Patrick	MacDonnell	Sen. Cotton	Speechwriter/Leg Aid
Robert	Ordway	Sen. Mike Braun	Counsel
Ryan	Rasins	Sen. Marco Rubio	Military LA
James	Hitchcock	Sen. Marco Rubio	Senior Policy Advisor
Peyton	Roth	Sen. Marco Rubio	Legislative Aid
Wells	King	Sen. J.D. Vance	Senior Policy Advisor
Will (Robert)	Green	Sen. Marco Rubio	Legislative Assistant
Vijay	Menon	Sen. Josh Hawley	Legislative Assistant
Blake	Seitz	Sen. Tom Cotton	Speechwriter
Patrick	Brenan	Sen. J.D. Vance	Investigations and Health Counsel
Katherine	Thompson	Sen. Josh Hawley	Foreign Policy Advisor

American Compass Conservative Economics Workshop

Friday, April 21-Sunday, April 23, 2023

Hyatt Chesapeake Bay | Cambridge, MD

Retreat Programing

Friday April 21

CHARTER BUS (IF RIDING)

Union Station

10:30am

Attendees arrive and board bus

11:00am

Bus departs to Hyatt Regency Chesapeake Bay

1:00pm

Bus arrives at Hyatt Regency Chesapeake Bay

1:00pm-5:00pm

REGISTRATION

2:00pm-3:30pm

BYOB: BUILD YOUR OWN BUDGET

The whole group will convene for a brief primer on the federal budget's structure, and then we will break into small groups to play with a Compass-developed budget model. Each group will need to settle on a package of tax and spending increases and cuts that close the budget by \$1 trillion over the next ten years. Choices will be shared and compared on Saturday morning.

Moderated by Oren Cass

3:00pm-5:00pm

CHECK-IN

3:30pm-4:30pm

PEER REVIEW

We'll be going around the horn, inviting each attendee to share what they're working on and everyone else to provide feedback.

Moderated by Oren Cass & Chris Griswold

5:00pm-6:30pm

WELCOME RECEPTION

6:30pm-8:30pm

DINNER

Prospects and Problems for Conservative Economics

Executive Director Oren Cass gives a keynote address on the opportunities and challenges facing the movement to change the economic policy consensus on the center-right.

Remarks by Oren Cass

8:30pm-11:00pm**NIGHTCAP & FELLOWSHIP**

An opportunity for attendees to gather and share a drink if they so choose before ending the day.

Saturday, April 22

8:00am-9:00am**BREAKFAST****SESSION I: IN SEARCH OF ALIGNMENT**

9:00am-12:15pm

After real-time polling to determine the sense of the group on a variety of issues, and a review of budget choices made the prior day, we'll hear from panels on issues of ongoing debate within the realignment and from Ambassador Robert Lighthizer on the best fights to have right now.

9:00am-9:30am**REAL-TIME POLLING**

Attendees will respond via their mobile devices to a variety of poll questions, seeing the group's responses in real-time. We will also see how the group fixed the federal budget.

9:35am-10:30am**PANEL: HOW COMPASSIONATE IS CONSERVATISM**

Conservatives have made significant progress in redefining their economic agenda to be more skeptical of markets generally and big business in particular, recognizing the role for public policy in supporting family, community, and industry. But most of what the government actually does is social spending: entitlements, insurance programs, and the safety net. What are the conservative principles that should guide policymakers and what implications does that have for salient political issues like Social Security and Medicare, Obamacare, safety-net work requirements, family policy, drug treatment, and student debt? How do the answers to those questions align with what the American people want?

Feat. Amber Lapp, Research Fellow at the Institute for Family Studies; Caleb Orr, Research Fellow with Boyden Gray & Associates; Charles Correll, Speechwriter for Speaker McCarthy*

Moderated by Chris Griswold

**Titles are for identification purposes only*

10:30am-10:45am**BREAK****10:45am-11:20am****Q&A WITH AMB. LIGHTHIZER**

Reconsideration of globalization, trade policy, and the Sino-American relationship have been central priorities for the New Right and among the most significant lasting achievements of the Trump Administration. In some respects, the Biden Administration has carried that work forward, while in others it seems more inclined to backslide. Ambassador Lighthizer will discuss key areas for holding the line or making further progress, and answer attendees' questions.

Moderated by Oren Cass

11:20am-12:15pm**PANEL: OUR WOBBLY STOOL**

The Reagan coalition's "three-legged stool," supported by economic libertarians, social conservatives, and Cold War hawks, assigned responsibility for different policy domains to different constituencies and held the emphasis on each in balance. At this point, the New Right looks more like a beanbag chair. What are the most important elements of the coalition's economic, social, and foreign policy, how do they fit together, and who should be emphasizing which, when? Are the economic and social emphases in conflict or merely competition, and how can they best complement each other?

Feat. Wells King, Senior Policy Advisor for Senator J.D. Vance; Emily Jashinsky, Culture Editor at The Federalist; Saurabh Sharma, President of American Moment*

Moderated by Oren Cass

12:15pm-1:30pm**LUNCH DEBRIEF**

Participants will share reactions to topics discussed in the panels. Discussion questions will be provided

Hosted by Duncan Braid

**Titles are for identification purposes only*

SESSION II: INDUSTRIAL POLICY IN PRACTICE

1:30pm-4:30pm

Attendees will participate in a Harvard Program on Negotiation simulation, attempting to forge an agreement to the construction of a deepwater harbor. (Further instructions available in your welcome packet.)

1:30pm-1:45pm**PLENARY: WELCOME TO SEABORNE**

An introduction to the simulation and brief explanation of rules and scoring.

1:45pm-4:30pm**BREAKOUT: HOW HARD COULD IT REALLY BE?**

A challenge in all policy making is aligning the interests of the necessary stakeholders. In groups of 10 to 12, attendees will engage in a simulated exercise where they will attempt to reach an agreement necessary to build a deepwater harbor. They will be assigned roles of key government, industry and political groups each with different and, at times, conflicting priorities. The simulation will be scored, and there are prizes.

Hosted by Duncan Braid

4:30pm-6:00pm**BREAK****6:00pm-8:00pm****DINNER**

Open buffet for attendees to eat at their convenience and discuss the weekend's programming so far

8:00pm-10:00pm**PAST AS PROLOGUE**

Attendees in small groups will be challenged with trivia about past political realignments, major legislative efforts, and other miscellany.

Hosted by Oren Cass

10:00pm-11:00pm**NIGHTCAP & FELLOWSHIP**

An opportunity for attendees to gather and share a drink if they so choose before ending the day.

Sunday, April 23

8:00am-9:00am**BREAKFAST****9:00am-10:00am****EXECUTIVE TIME****SESSION III: REALIGNMENT ON THE JOB**

10:00am-12:30pm

Attendees will meet in groups organized by profession to discuss challenges and opportunities in their own work, before reconvening to compare notes.

10:00am-11:00am**BREAKOUT: SHOP TALK**

Attendees in small groups apply insights from the previous sessions to their own careers and consider how they might help or be helped by colleagues in other professions.

11:10am-12:15pm**PLENARY: BRINGING IT ALL TOGETHER**

Attendees reconvene to discuss their own priorities and opportunities for collaboration. American Compass shares its own plans for the coming year.

12:30pm-1:30pm**CLOSING LUNCH****CHARTER BUS (IF RIDING)***Front Lobby***1:30pm***Attendees load their luggage onto the bus.***2:00pm***Bus departs to Union Station***4:00pm***Bus arrives at Union Station*

**Titles are for identification purposes only*